

# SEOUL OFFICE LEASING

May 2022 Monthly Market Review

## 조사개요

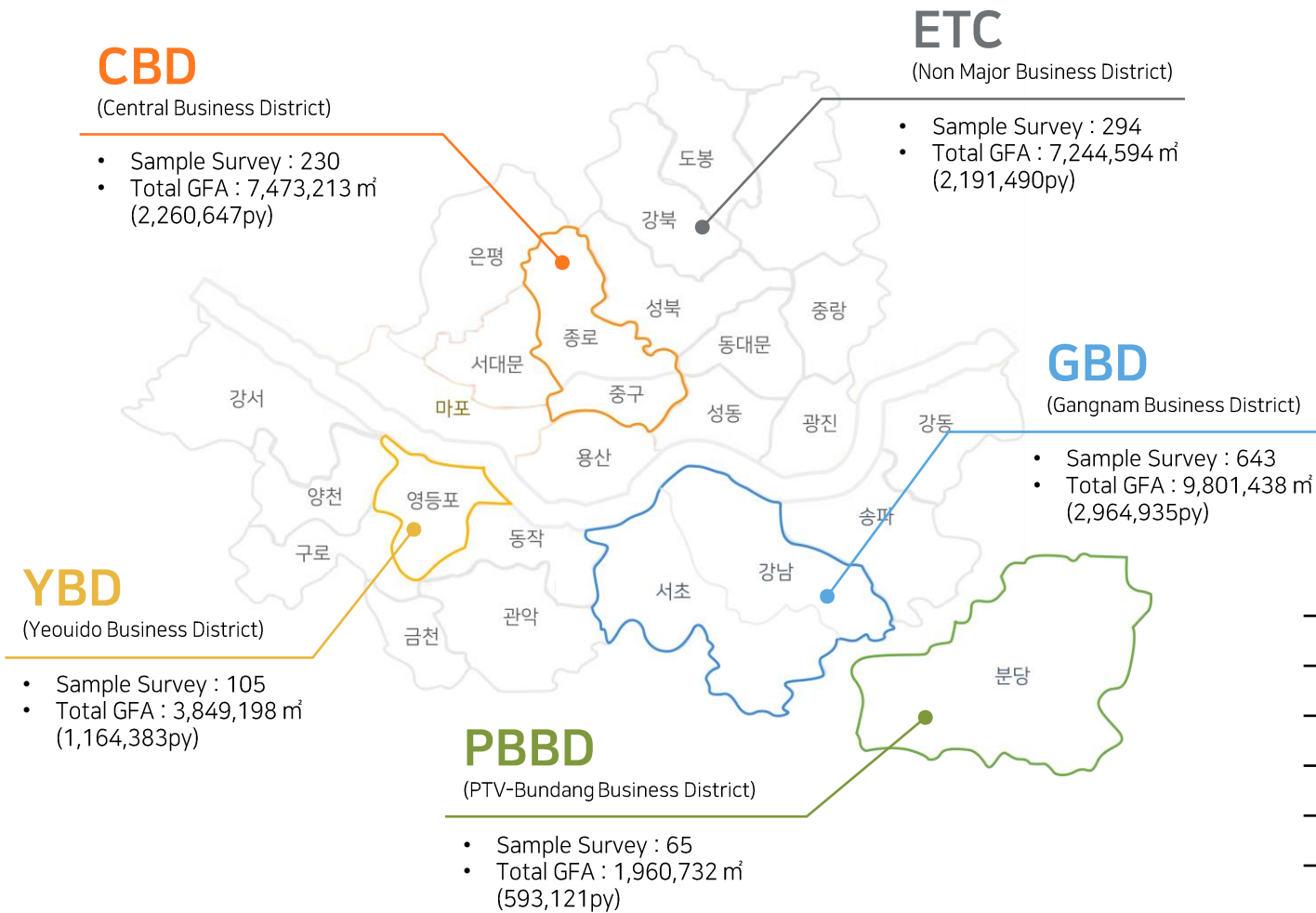
지역	서울 전 지역 및 판교, 분당 지역
대상	연면적 1,000㎡(330py) 이상, 지상 4층 이상의 업무시설 및 업무 복합시설
조사 방법	전화조사 및 자산관리업체의 발표자료, 공시자료 등 참고
조사 내용	오피스 임대 및 공실 변화, 임차인 이동현황, 거래 사례 등
조사 기간	2022년 4월 1개월 간 조사
DB 관리	OKEY 리서치센터는 업무용 빌딩의 공실정보 및 임대료를 조사하고 있으며, 사무실 임대플랫폼 OKEY Office Key를 통하여 관리 활용되고 있습니다.

## 권역별 분류

CBD Central Business District	GBD Gangnam Business District	YBD Yeouido Business District	ETC Non Major Business District	PBBD PTV-Bundang Business District
<b>도심권</b> 종로구, 중구 일대	<b>강남권</b> 강남구, 서초구 일대	<b>여의도권</b> 여의도, 영등포구 일대	<b>서울기타권</b> 상암, 마포, 용산 등 주요권역에 속하지 않은 서울권역	<b>판교, 분당권</b> 판교테크노밸리, 성남시 분당구 일대

## 오피스 규모별 분류기준

OKEY	P Grade Prime 빌딩	S Grade 대형 빌딩	A Grade 중대형 빌딩	B Grade 중소형 빌딩	C Grade 소형 빌딩
연면적	15,000py 이상	7,000py 이상	4,000py 이상	1,000py 이상	1,000py 미만
기준층 임대면적	500py 이상	300py 이상	200py 이상	150py 이상	150py 미만



Building Survey : Total 1,337

	P	S	A	B
CBD	45	68	33	84
GBD	28	85	90	440
YBD	18	24	28	35
ETC	40	57	53	144
PBBD	10	16	13	26

● NOC (Net Occupancy Cost)

오피스시장의 특성상 임대형태(전세, 월세) 및 빌딩특성이 각각 다른 오피스 빌딩의 비교를 위하여 전용면적 1평당 임대 할 때 필요한 비용을 월 단위로 환산한 수치

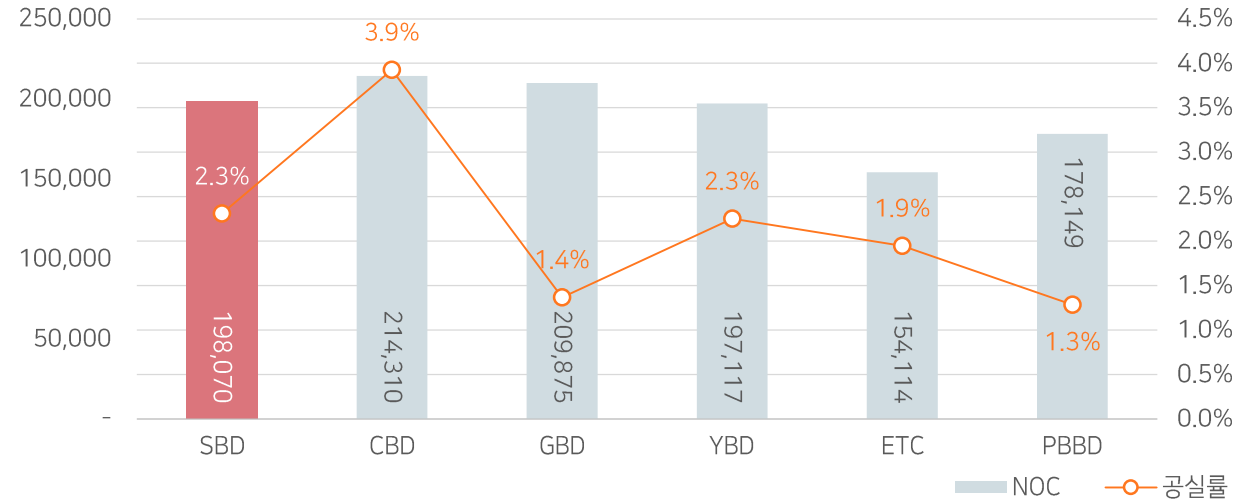
# 01 SBD 서울 전체

공실률  
2.31% ↓

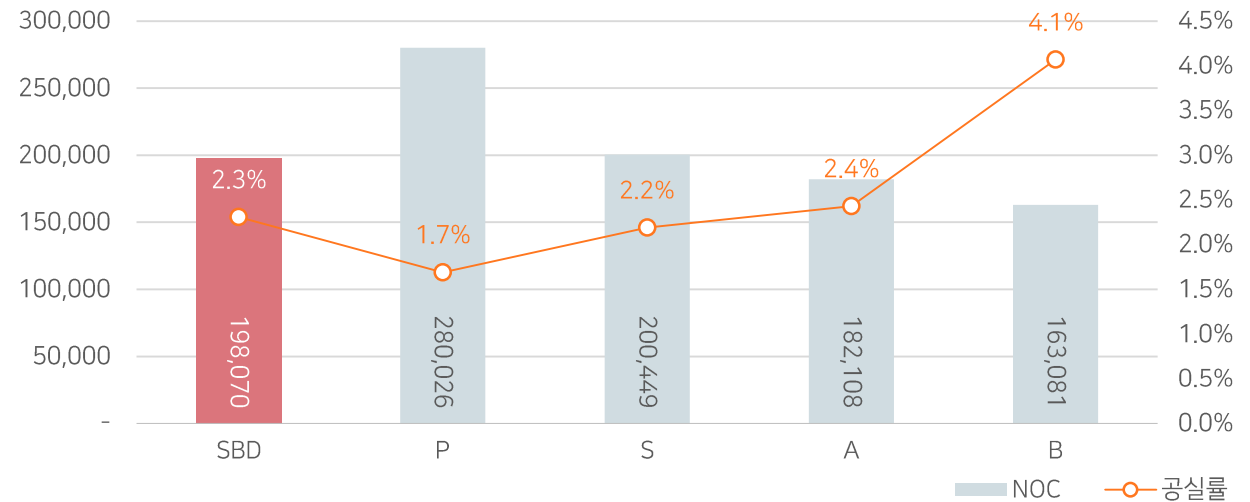
평균 NOC  
₩ 198,070 ↑

평균 임대료	평균 보증금	평균 관리비
83,040	909,241	30,987

2022년도 4월 조사한 서울지역 오피스의  
평균 공실률은 2.31%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 198,070원으로 조사되었다.



■ 서울 전체 권역 별 공실률 / NOC



■ 서울 전체 규모 별 공실률 / NOC



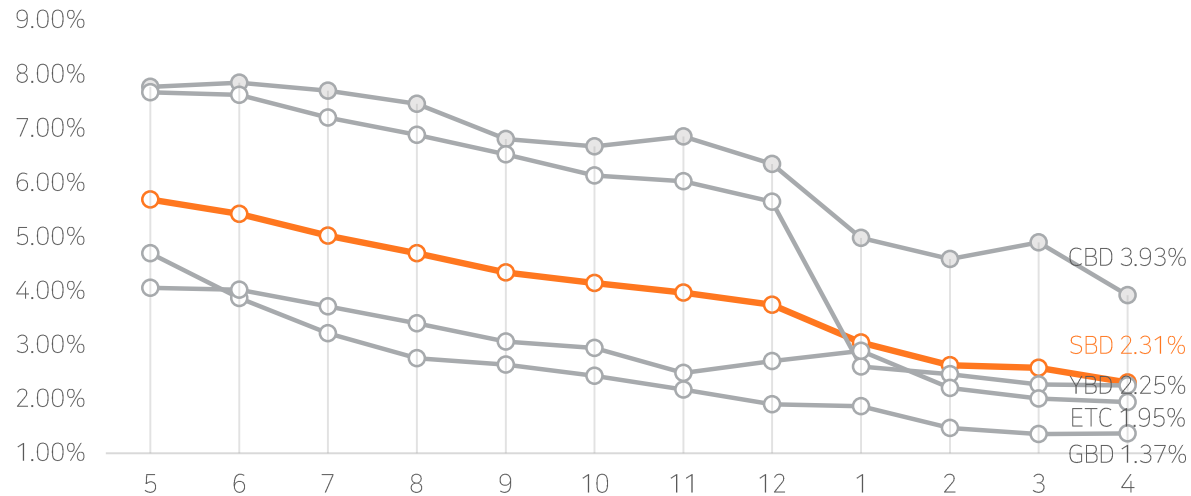
# 01 SBD 서울 전체

2022년 5월 서울권역의 공실률 흐름은 다음과 같이 조사되었다.

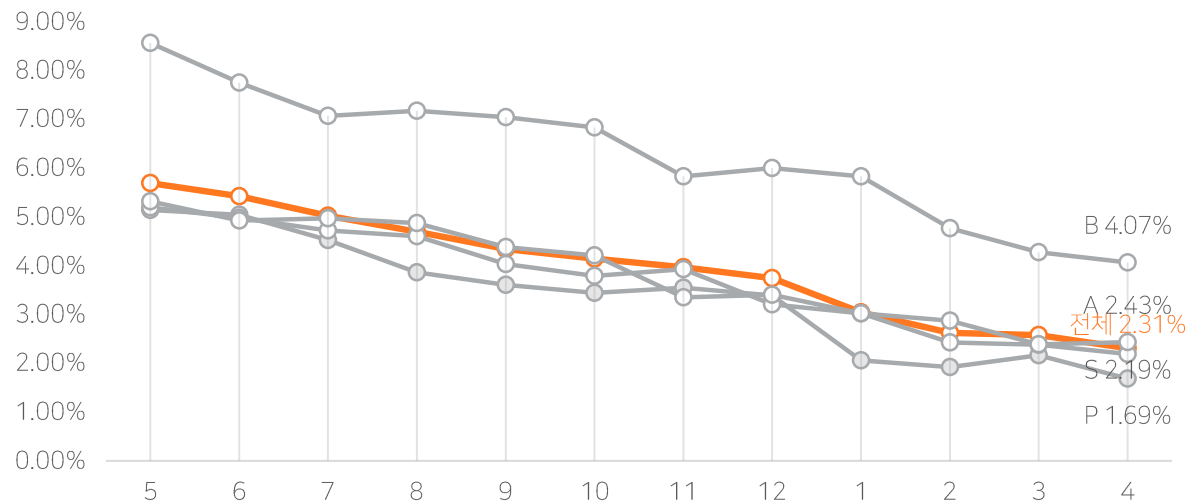
CBD의 D타워에 지멘스가 3개 층 2,010평에 입주를 완료하였고, 삼환빌딩에서 현대엔지니어링이 사용하던 면적 중 3개 층 1,560평이 추가로 임대시장에 나왔다.

GBD 마제스타시티 타워1에서 명동 타임워크로 이전 예정인 에이블씨앤씨와 관련사 제뉴원사이언스가 사용 중인 4개 층 2,370평의 면적이 임대시장에 나왔다.

잠실의 롯데월드타워에 BHC가 1개 층 1,520평의 면적을 사용하며 입주할 예정이고, 상암동의 DDMC빌딩 1개 층을 사용중인 SKY TV가 8월까지 S-City로 이전할 예정으로 DDMC에 1,700평의 면적이 추가되었고, S-City의 3개 층 2,470평의 공실이 모두 해소되었다.



■ 서울 권역별 공실률 변화



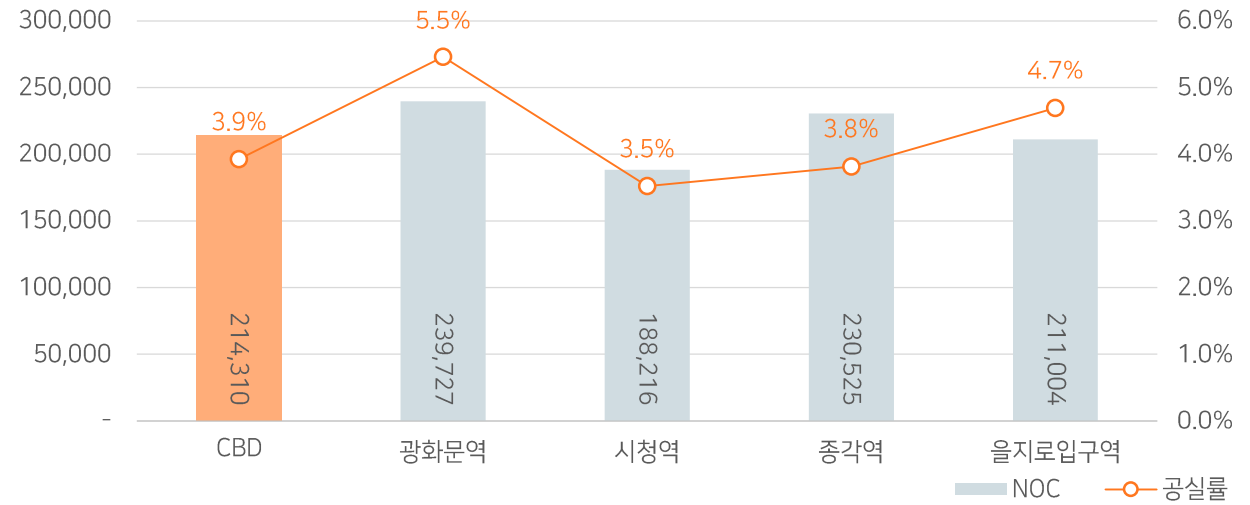
■ 서울 규모별 공실률 변화

# 02 CBD 도심권역

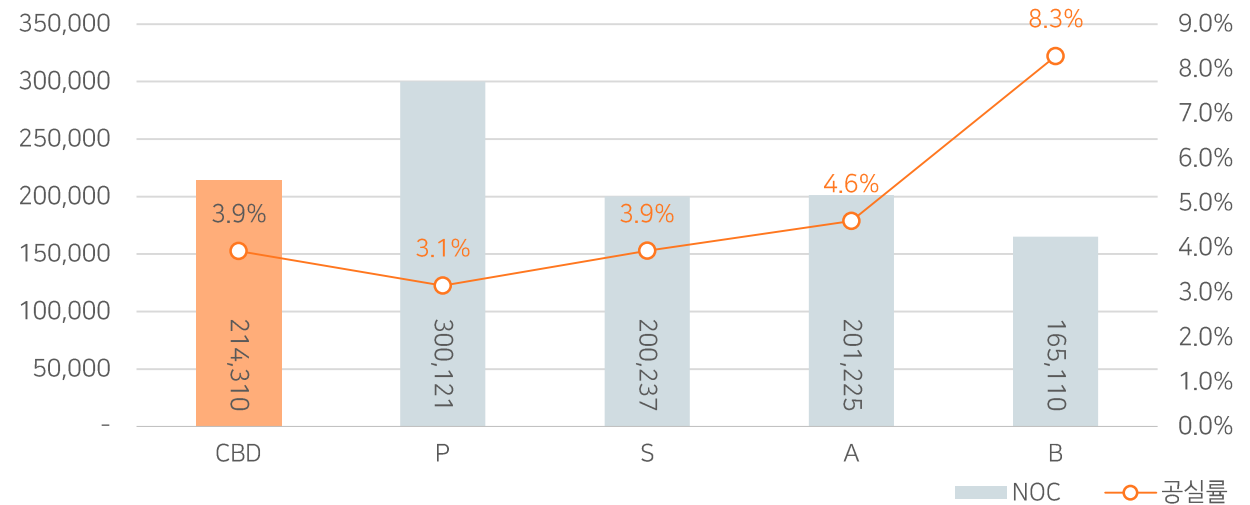
공실률 3.93% ↓ 평균 NOC ₩ 214,310 ↓

평균 임대료	평균 보증금	평균 관리비
89,201	890,081	35,648

2022년도 4월 조사한 도심지역 오피스의 평균 공실률은 3.93%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 214,310원으로 조사되었다.



■ CBD 지역 세부권역별 공실률/NOC



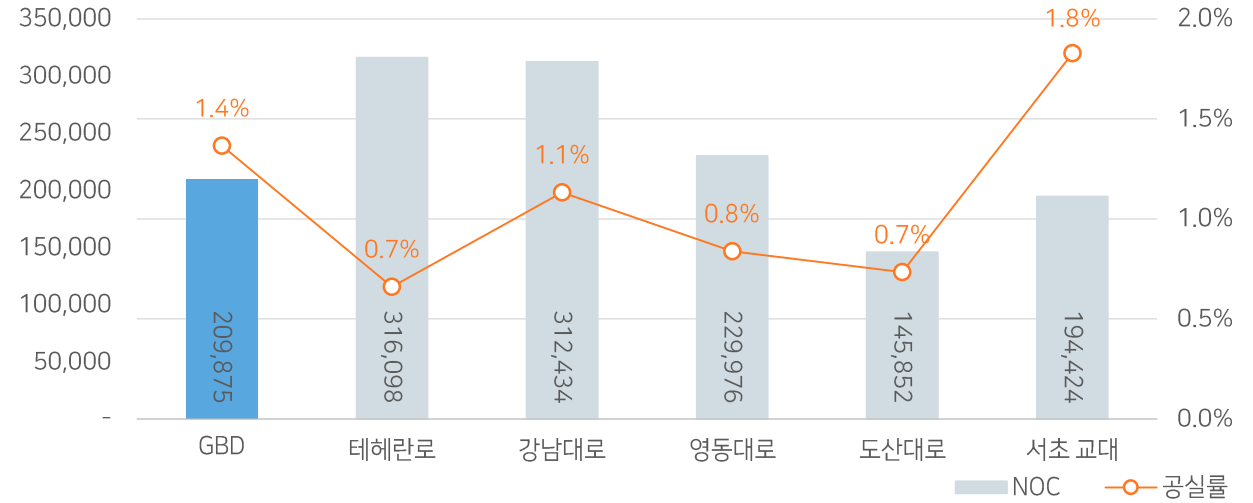
■ CBD 지역 규모별 공실률/NOC

# 73 GBD 강남권역

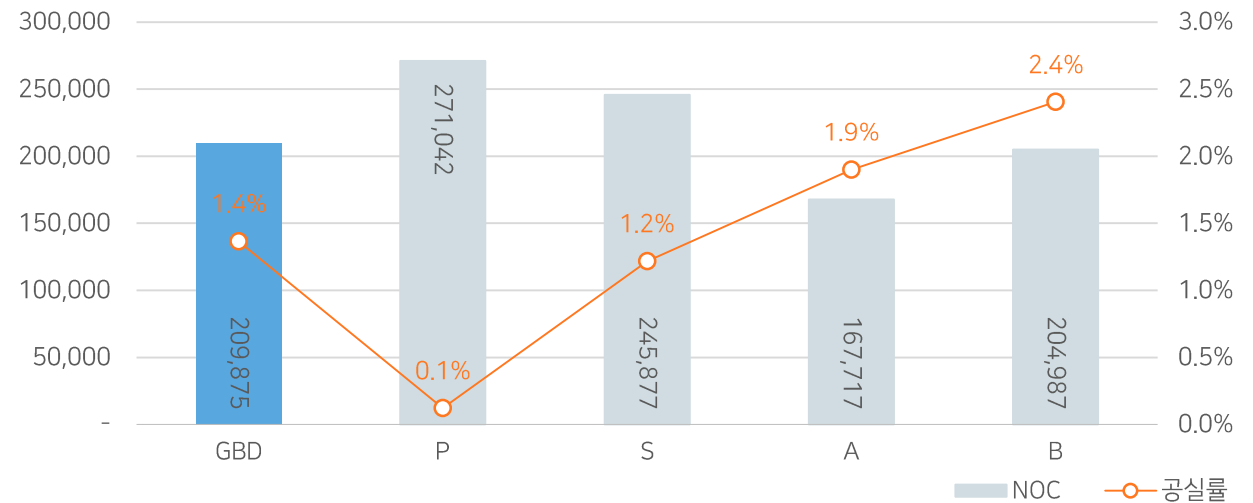
공실률 1.37% ↓ 평균 NOC ₩ 209,875 ↑

평균 임대료	평균 보증금	평균 관리비
96,872	1,284,012	28,597

2022년도 4월 조사한 강남지역 오피스의 평균 공실률은 1.37%로 조사되었으며, 전용면적 1평당 사용할 때 드는 비용을 계산한 평균 NOC는 209,875원으로 조사되었다.



■ GBD 지역 세부권역별 공실률/NOC



■ GBD 지역 규모 별 공실률/NOC

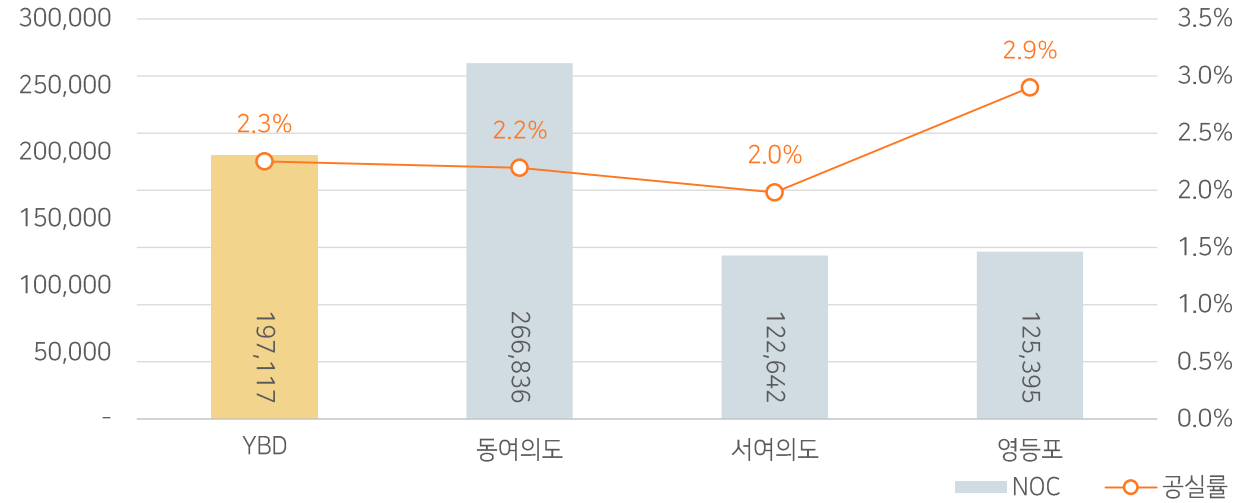
# 24 YBD 여의도, 영등포 권역

공실률  
2.25% ↓

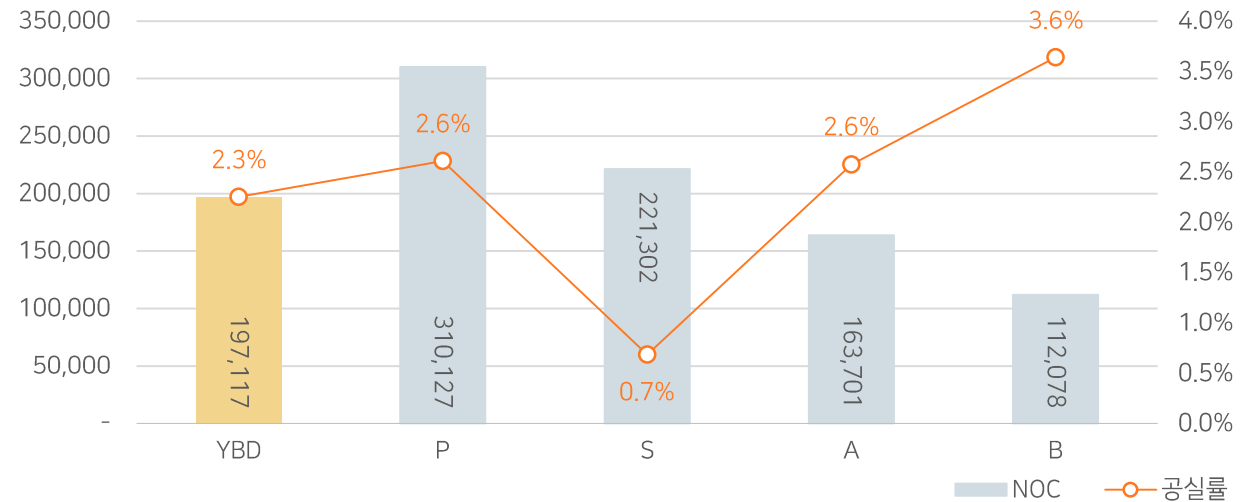
평균 NOC  
₩ 197,117 ↑

평균 임대료	평균 보증금	평균 관리비
73,518	774,759	31,198

2022년도 4월 조사한 여의도, 영등포 지역  
오피스의 평균 공실률은 2.25%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 197,117원으로 조사되었다.



■ YBD 지역세부권역별 공실률/NOC



■ YBD 지역규모 별 공실률/NOC



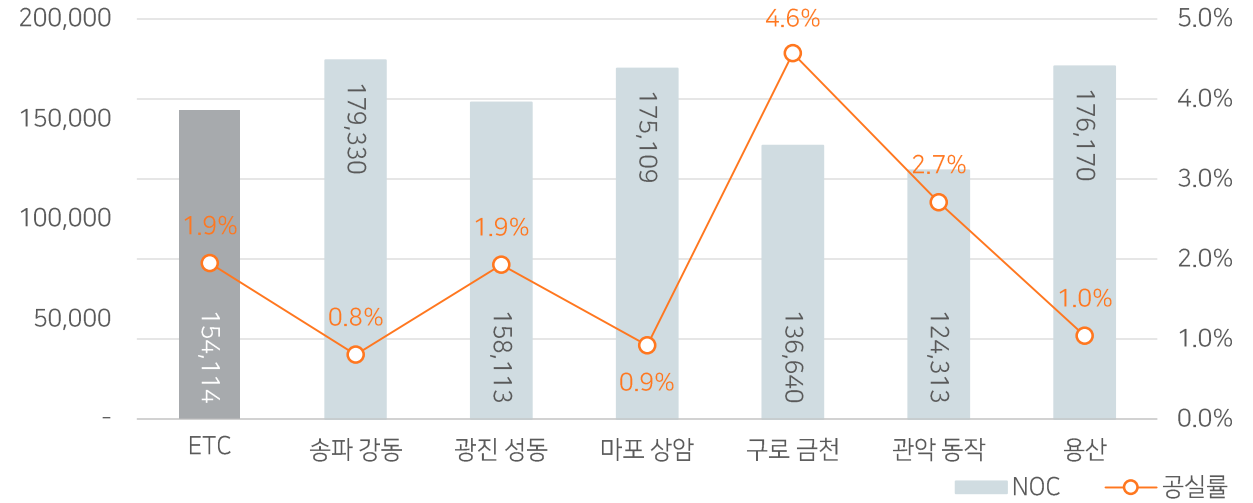
# 75 ETC 서울 기타권역

공실률  
1.95% ↓

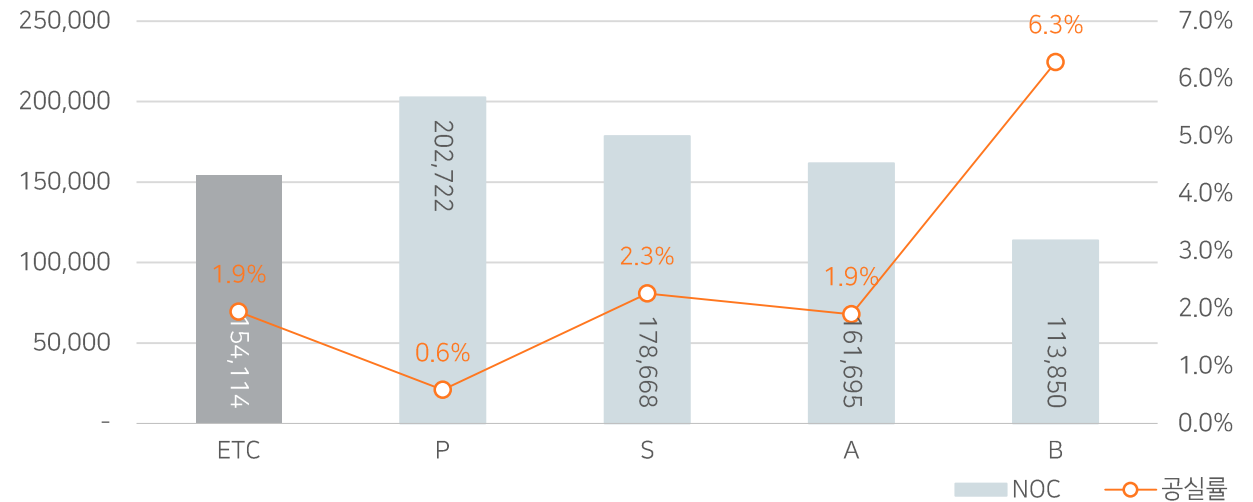
평균 NOC  
₩ 154,114 ↓

평균 임대료	평균 보증금	평균 관리비
62,134	705,036	22,693

2022년도 4월 조사한 서울 기타지역 오피스의  
평균 공실률은 1.95%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 154,114원으로 조사되었다.



ETC 지역 세부권역별 공실률 / NOC



ETC 지역 규모별 공실률 / NOC

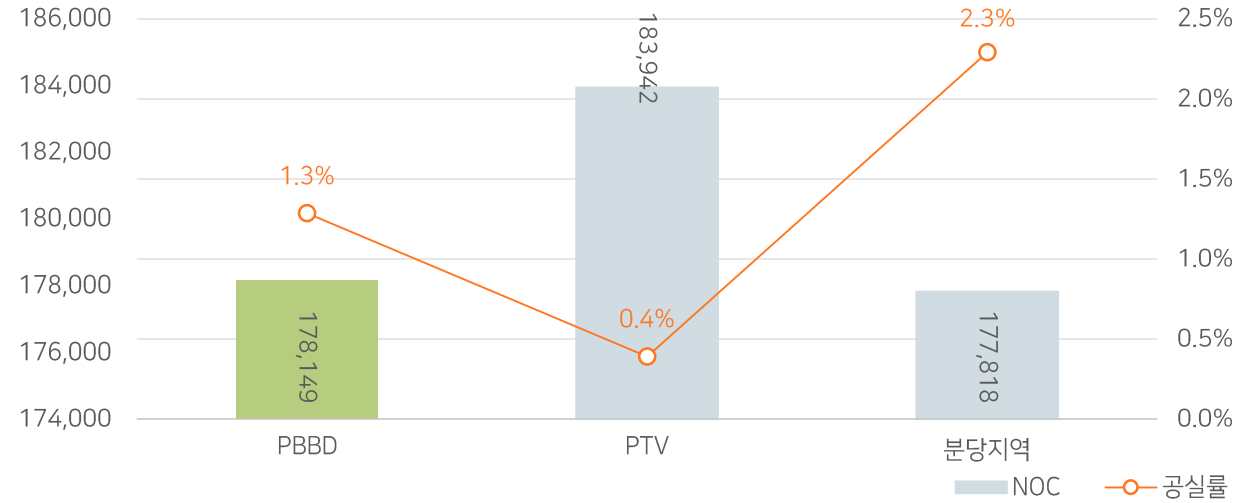
# 76 PBBD 판교, 분당 권역

공실률  
1.28% ↓

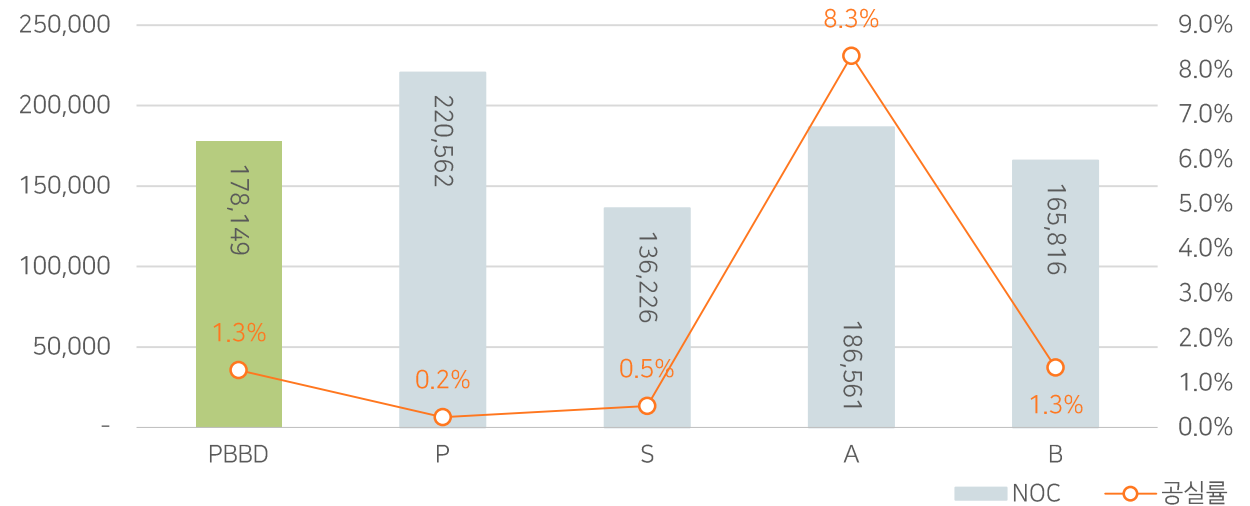
평균 NOC  
₩ 178,149 ↑

평균 임대료	평균 보증금	평균 관리비
61,452	703,488	26,389

2022년도 4월 조사한 판교, 분당지역 오피스의  
평균 공실률은 1.28%로 조사되었으며,  
전용면적 1평당 사용할 때 드는 비용을 계산한  
평균 NOC는 178,149원으로 조사되었다.



■ PBBD 지역 세부권역 별 공실률 / NOC



■ PBBD 지역 규모 별 공실률 / NOC

# 세부 지역 별 임대 현황

구역	세부구역	총임대면적	평균보증금	평균임대료	평균관리비	평균NOC	공실률
CBD	광화문역	289,581	1,009,452	101,071	36,039	239,727	5.46%
	시청역	288,244	708,894	72,520	31,783	188,216	3.52%
	종각역	299,673	930,559	96,543	40,016	230,525	3.82%
	을지로입구역	244,548	812,725	85,789	36,840	211,004	4.69%
GBD	테헤란로	983,729	1,794,720	164,127	34,745	316,098	0.66%
	강남대로	492,748	1,956,029	170,306	31,808	312,434	1.13%
	영동대로	202,087	905,747	83,915	27,974	229,976	0.84%
	도산대로	93,962	842,226	57,313	23,925	145,852	0.73%
	서초 교대	128,306	1,111,220	88,884	30,182	194,424	1.83%
YBD	동여의도	863,391	942,551	96,383	37,998	266,836	2.20%
	서여의도	158,836	442,473	43,101	24,528	122,642	1.98%
	영등포	142,156	836,822	59,183	19,094	125,395	2.90%
ETC	송파 강동	513,800	853,719	74,520	24,771	179,330	0.80%
	광진 성동	152,371	880,927	74,438	19,406	158,113	1.93%
	마포 상암	582,734	883,904	71,755	31,752	175,109	0.92%
	구로 금천	206,847	609,518	55,247	15,574	136,640	4.57%
	관악 동작	144,775	641,610	54,738	19,608	124,313	2.71%
	용산	279,535	709,288	68,854	35,647	176,170	1.04%
PBBD	PTV	313,979	775,000	77,500	10,000	183,942	0.39%
	분당지역	279,143	699,401	60,535	26,857	177,818	2.29%

지역 별  
사용승인 현황

권역	빌딩명	소재지	주용도	연면적(m <sup>2</sup> )	연면적(3.3m <sup>2</sup> )	사용승인일
GBD	영동SC빌딩	강남구 역삼동	제1종근린생활시설	5,213	1,577	10-Mar
	에이타워2	강남구 삼성동	업무시설	2,000	605	23-Mar
	에이타워1	강남구 삼성동	업무시설	1,883	570	23-Mar
	C빌딩	강남구 대치동	제2종근린생활시설	1,606	486	25-Mar
ETC	선명스퀘어	성동구 성수동1가	공장	25,104	7,594	08-Mar
	MASS C&G	강서구 마곡동	교육연구시설	7,007	2,120	25-Mar
	코이스	강서구 마곡동	교육연구시설	5,232	1,583	07-Mar
	드림 앤 드림	강서구 화곡동	제1종근린생활시설	2,652	802	15-Mar
	경성빌딩	중랑구 면목동	제2종근린생활시설	1,430	433	04-Mar
	JB빌딩	송파구 잠전동	교육연구시설	1,383	418	14-Mar
	AMC빌딩	마포구 동교동	제2종근린생활시설	1,138	344	17-Mar

## Survey Overview

Target Areas	All districts in Seoul and Pangyo & Bundang districts
Target Samples	Commercial properties of 4 stories or more, and with a gross floor area of 1,000m <sup>2</sup> (=300py) or more
Survey Method	Telephone enquiry, publications from property management and Korea's government
Main Focus	Market trend in a property industry, changes in vacancy rate and tenants' inflow/outflow etc.
Survey Period	One calendar month, April 2022
DB Mangement	Okey Research Center has carried out our research with a large number of sample data and provided the vacancy and rent information of office buildings via our office lease platform 'OKEY- Office Key'.
Exchange Rate	1 USD = 1,266.50 KRW (0.79 USD = 1,000 KRW) as of 2nd May 2022

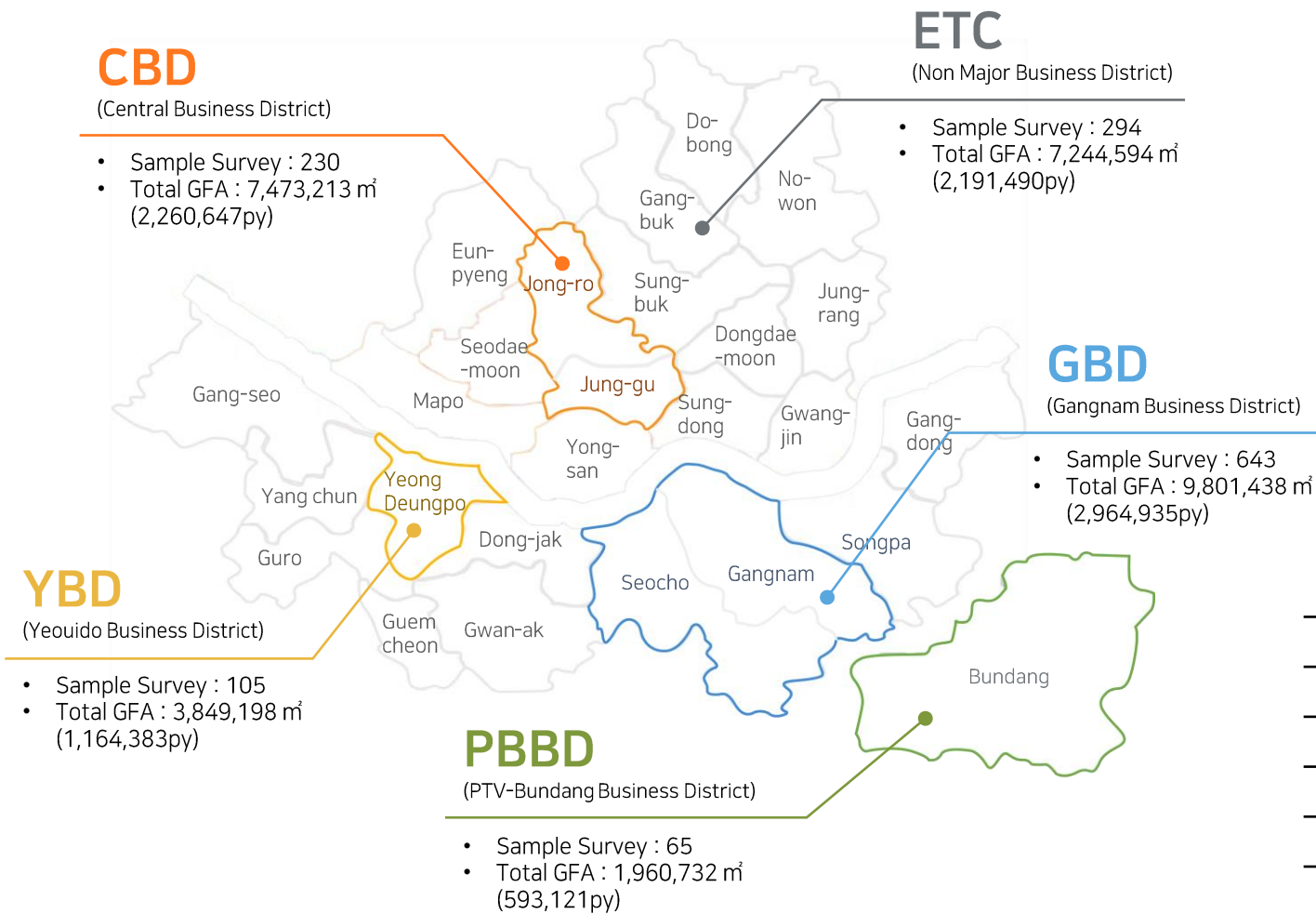
## 5 Regional Divisions in Seoul

CBD	GBD	YBD	ETC	PBBB
Central Business District	Gangnam Business District	Yeouido Business District	Non Major Business District	PTV-Bundang Business District
Jongro-gu, Jung-gu, etc.	Gangnam-gu, Seocho-gu, etc.	Yeouido, Yeongdeungpo-gu etc.	Songpa, Mapo, Yongsan and other areas outside Central Seoul	Pangyo Techno Valley, Bundang-gu in Sungnam-si etc.

## Categories of Office Buildings by Their Sizes

OKEY	P Grade Prime Building	S Grade Large Building	A Grade Large-Medium	B Grade Medium-Small	C Grade Small Building
Gross Floor Area	49,587m <sup>2</sup> (15,000py)	23,140m <sup>2</sup> (7,000py)	13,223m <sup>2</sup> (4,000py)	Above 3,306m <sup>2</sup> (Above 1,000py)	Under 3,306m <sup>2</sup> (Under 1,000py)
Lease Area of Sample Floor	1,653m <sup>2</sup> (500py)	992m <sup>2</sup> (300py)	661m <sup>2</sup> (200py)	Above 496m <sup>2</sup> (Above 150py)	Under 496m <sup>2</sup> (Under 150py)

## Sample Size of Each District



Building Survey : Total 1,337

	P	S	A	B
CBD	45	68	33	84
GBD	28	85	90	440
YBD	18	24	28	35
ETC	40	57	53	144
PBB	10	16	13	26

### • NOC (Net Occupancy Cost)

The monthly cost that 1m<sup>2</sup> of net area incurs to a tenant who rents the property.  
NOC can be useful to compare between different types of office buildings.



# 01 SBD Seoul Capital Area

Vacancy rate

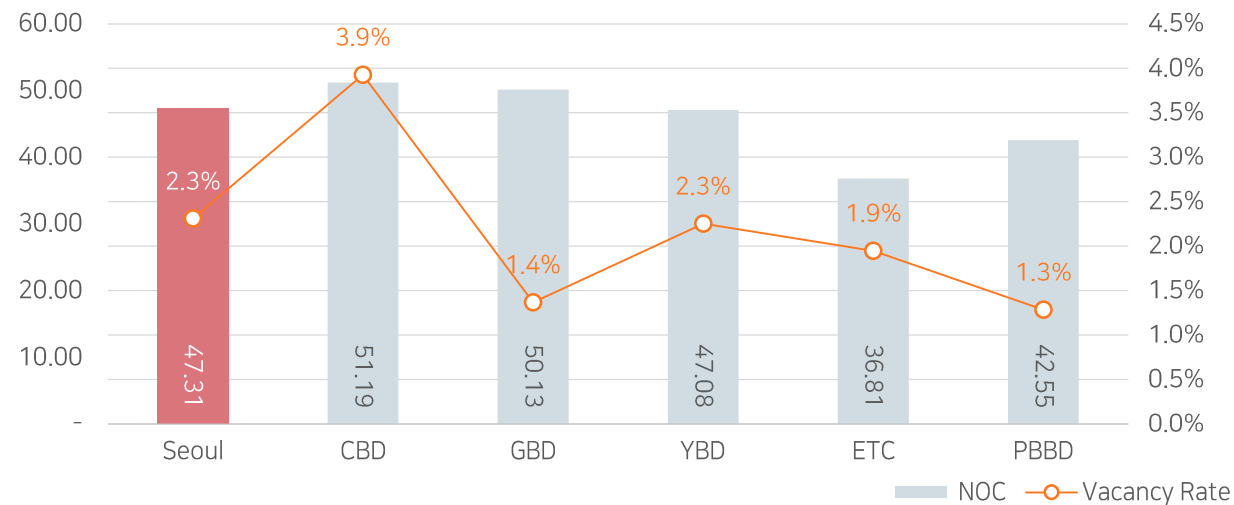
2.31% ↓

Avg, NOC

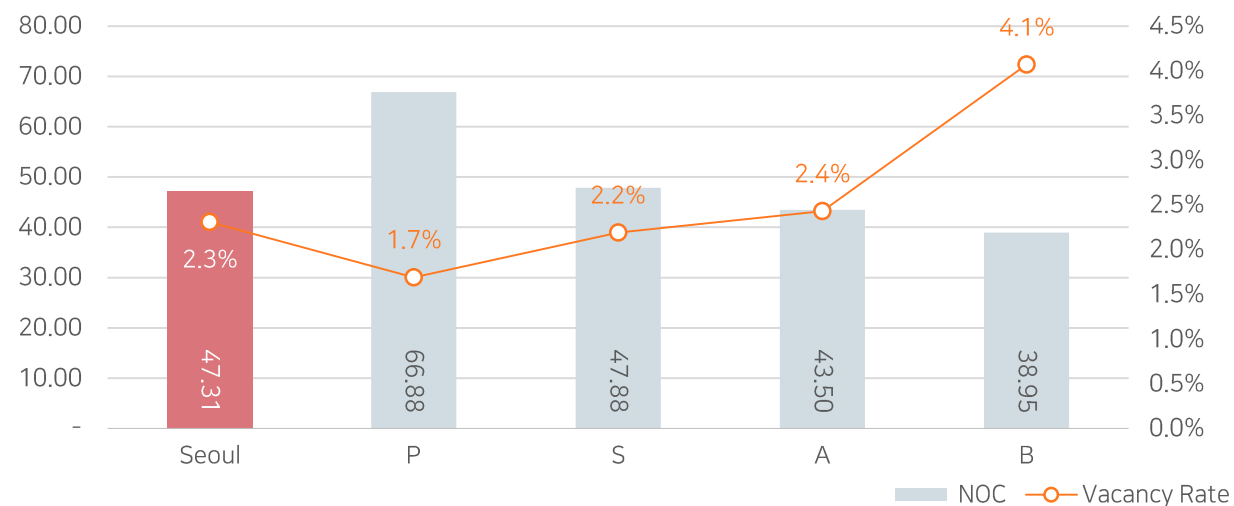
\$ 47.31 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
19.83	217.17	7.40

The average vacancy rate of the office buildings in Seoul is 2.31 % as of April 2022, and the average NOC is \$ 47.31.



■ Vacancy Rate & NOC in Seoul and Each District



■ Vacancy Rate & NOC in Seoul & Each Building Category

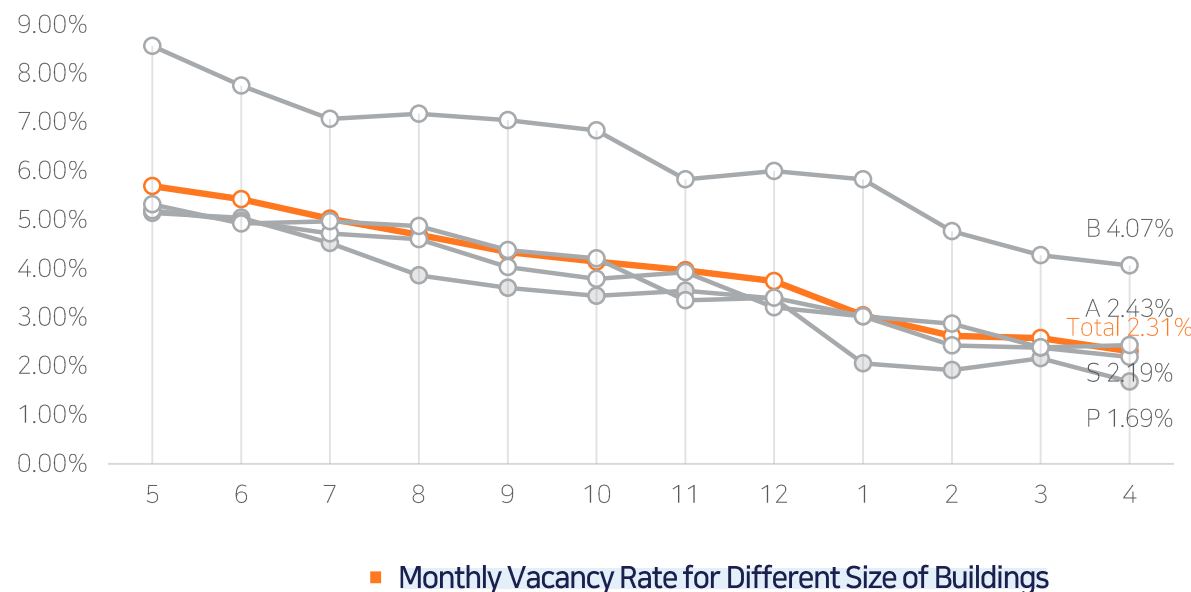
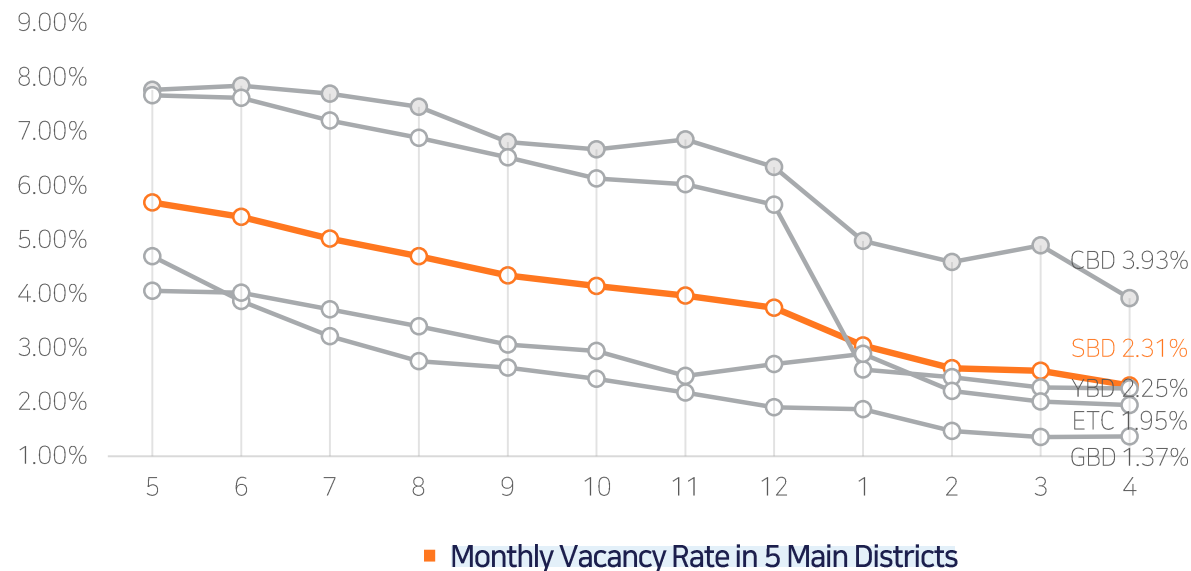
# 01 SBD Seoul Capital Area

The following charts indicate the vacancy level during May 2022. Siemens moved into D-Tower in CBD occupying the 3 floors, of 6,650m<sup>2</sup> in total, in the tower. In Sam Hwan Building, the 3 floors of 5,160m<sup>2</sup> in total came on the lease market in Seoul, which were rented by Hyundai Engineering Corporation.

In GBD, the office space of 7,840 m<sup>2</sup>, located over the 4 floors in MajeStarCity Tower 1, came on the lease market. These units were previously rented by Able C&C and Genuone Sciences, which plan to move to TimeWalk Building in Myeong-dong, Seoul.

BHC Corp. plans to rent the one entire floor of 5,020m<sup>2</sup> in Lotte World Tower in Jamsil.

SKY TV Corp., currently renting one floor in DDMC Building, plans to move into S-City Building by August 2022. Due to this moving plan, the office units of 5,620 m<sup>2</sup> came on the lease market in Seoul and the vacant units of 8,160 m<sup>2</sup>, located over 3 floors, in S-City disappeared from the market.



# 02 CBD Central Seoul

Vacancy rate

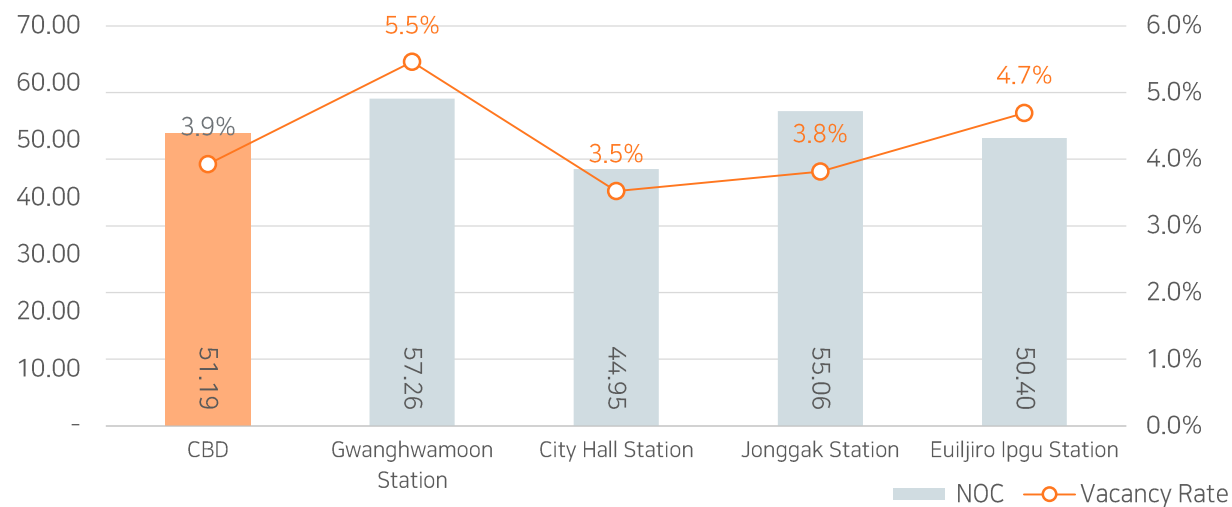
3.93% ↓

Avg, NOC

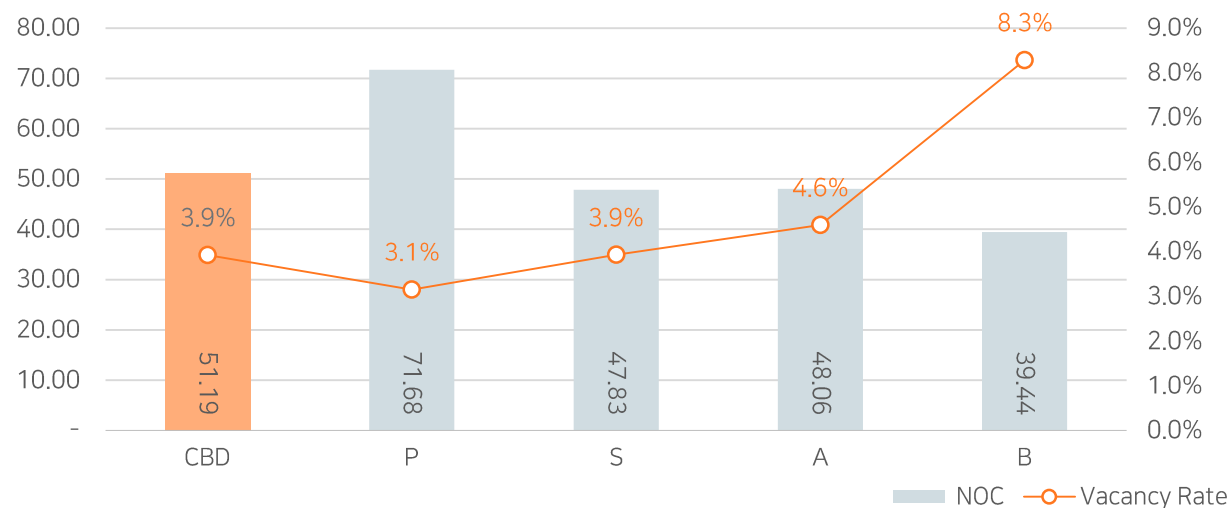
\$ 51.19 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
21.31	212.59	8.51

The average vacancy rate of the office buildings in CBD is 3.93 % as of April 2022, and the average NOC is \$ 51.19.



■ Vacancy Rate & NOC in Central Business District (CBD)



■ Vacancy Rate & NOC for Different Sizes of Building in CBD

# GBD Gangnam

Vacancy rate

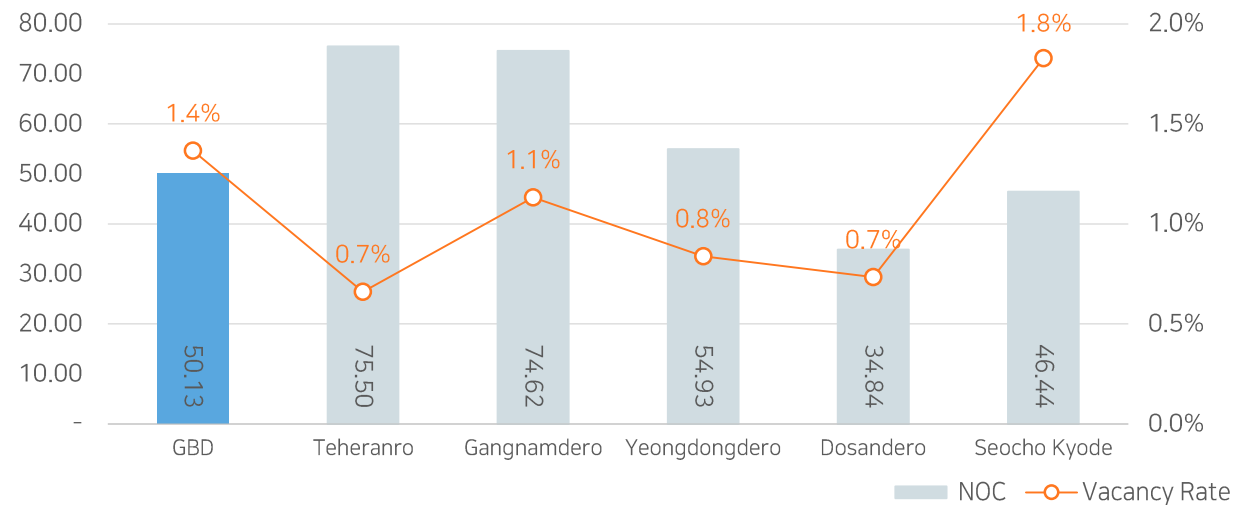
1.37% ↓

Avg, NOC

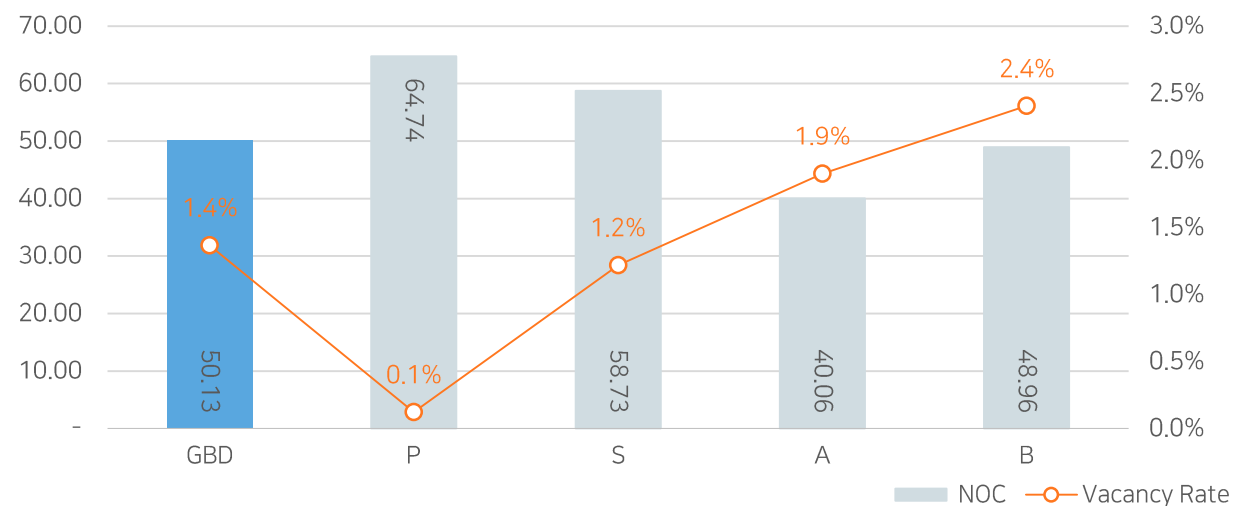
\$ 50.13 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
23.14	306.68	6.83

The average vacancy rate of the office buildings in GBD is 1.37 % as of April 2022, and the average NOC is \$ 50.13.



■ Vacancy Rate & NOC in Gangnam Business District (GBD)



■ Vacancy Rate & NOC for Different Sizes of Building in GBD

# 24 YBD Yeouido & Yeongdeungpo

Vacancy rate

2.60% ↓

Avg, NOC

\$ 53.09 ↓

Avg.  
Rent

17.56

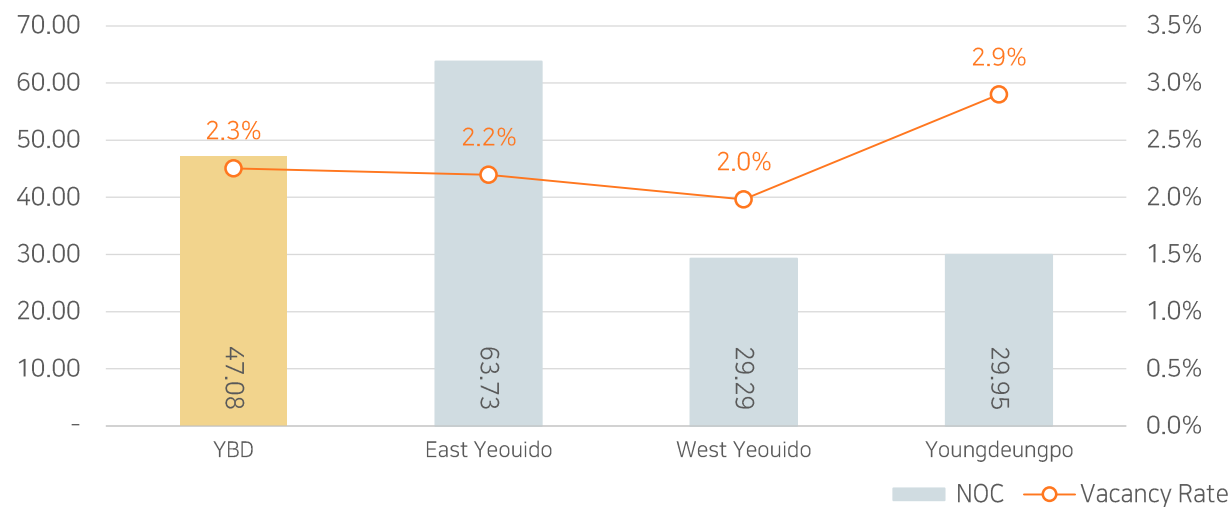
Avg.  
Deposit

185.05

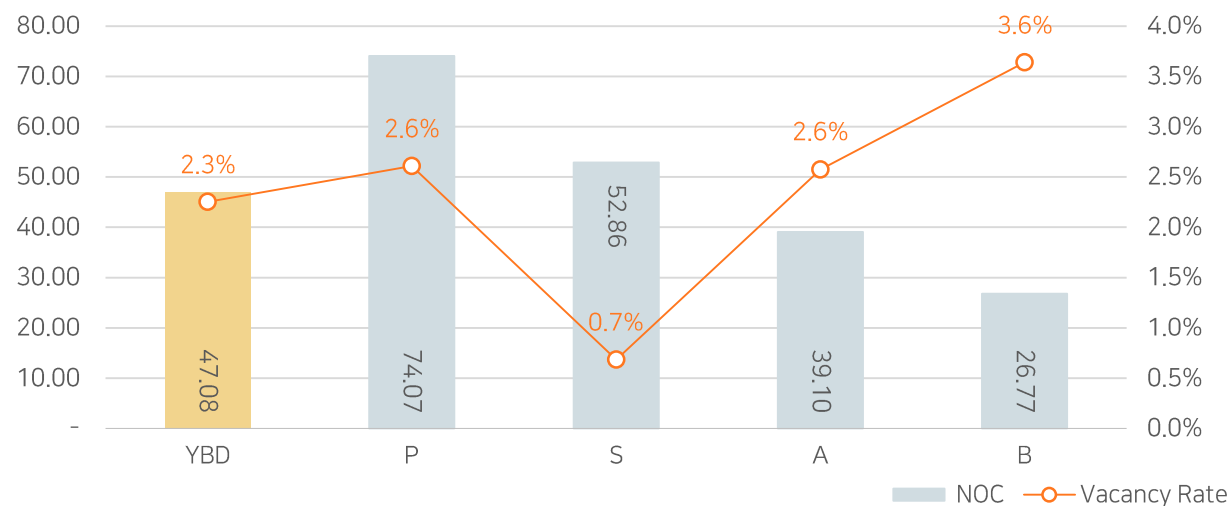
Avg.  
Management.  
Fee

7.45

The average vacancy rate of the office buildings in YBD is 2.25 % as of April 2022, and the average NOC is \$ 47.08.



■ Vacancy Rate & NOC in Yeongdeungpo Business District (YBD)



■ Vacancy Rate & NOC for Different Sizes of Building in YBD

# 75 ETC Other District in Seoul

Vacancy rate

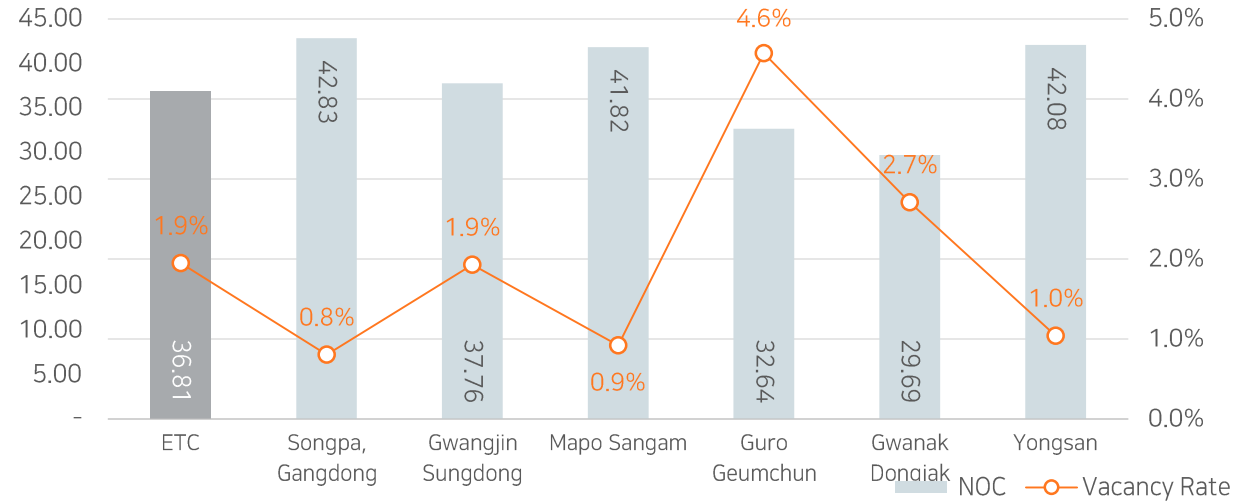
1.95 % ↓

Avg, NOC

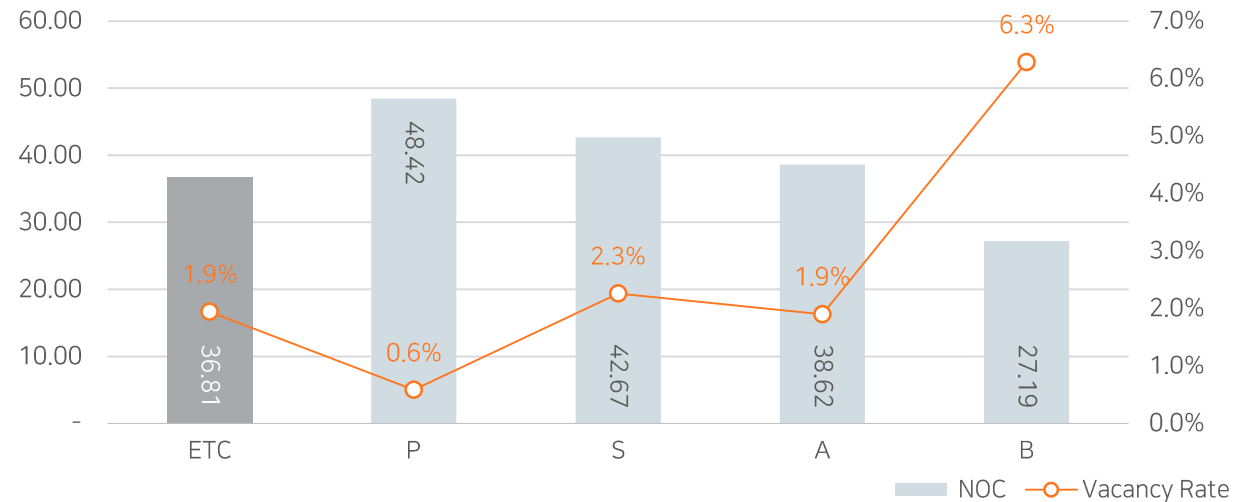
\$ 36.81 ↓

Avg. Rent	Avg. Deposit	Avg. Management. Fee
14.84	168.40	5.42

The average vacancy rate of the office buildings in ETC is 1.95 % as of April 2022, and the average NOC is \$ 36.81.



■ Vacancy Rate & NOC in Other District in Seoul (ETC)



■ Vacancy Rate & NOC for Different Sizes of Building in ETC



# 76 PBBD PANGYO & BUNDANG

Vacancy rate

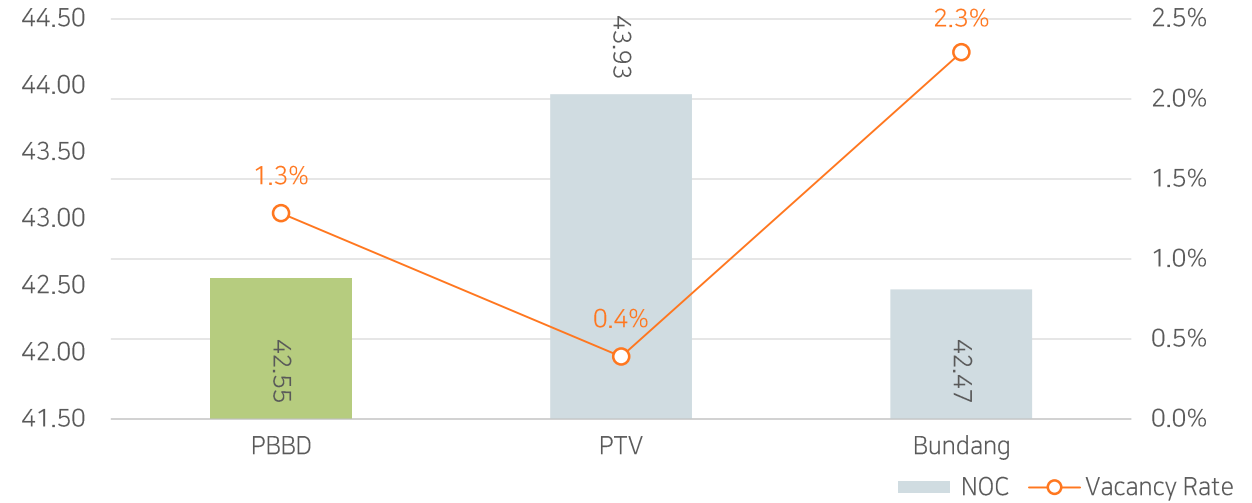
1.28% ↓

Avg, NOC

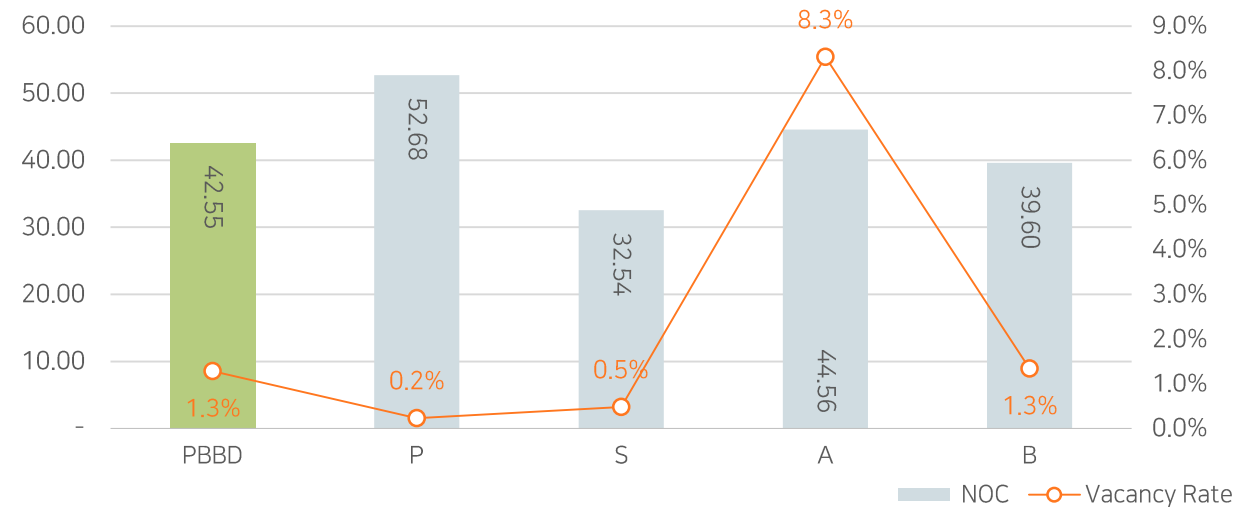
\$ 42.55 ↑

Avg. Rent	Avg. Deposit	Avg. Management. Fee
14.68	168.03	6.30

The average vacancy rate of the office buildings in PBBD is 1.28 % as of April 2022, and the average NOC is \$ 42.55.



■ Vacancy Rate & NOC in Pangyo & Bundang Business District (PBBD)



■ Vacancy Rate & NOC for Different Sizes of Building in PBBD



## Overall Lease status

Market	Submarket	Gross Leasing Area	Avg. Deposit	Avg. Rent	Avg. Mgmt. Fee	Avg. NOC	Vacancy rate
CBD	Gwanghwamoon Station	957,292	241.10	24.14	8.61	57.26	5.46%
	City Hall Station	952,872	169.32	17.32	7.59	44.95	3.52%
	Jonggak Station	990,653	222.26	23.06	9.56	55.06	3.82%
	Euiljiro Ipgu Station	808,422	194.12	20.49	8.80	50.40	4.69%
GBD	Teheranro	3,251,995	428.66	39.20	8.30	75.50	0.66%
	Gangnamdero	1,628,920	467.19	40.68	7.60	74.62	1.13%
	Yeongdongdero	668,056	216.34	20.04	6.68	54.93	0.84%
	Dosandero	310,618	201.16	13.69	5.71	34.84	0.73%
	Seocho Gyodae	424,152	265.41	21.23	7.21	46.44	1.83%
YBD	East Yeouido	2,854,184	225.13	23.02	9.08	63.73	2.20%
	West Yeouido	525,077	105.68	10.29	5.86	29.29	1.98%
	Youngdeungpo	469,937	199.87	14.14	4.56	29.95	2.90%
ETC	Songpa, Gangdong	1,698,511	203.91	17.80	5.92	42.83	0.80%
	Gwangjin Sungdong	503,706	210.41	17.78	4.63	37.76	1.93%
	Mapo Sangam	1,926,393	211.12	17.14	7.58	41.82	0.92%
	Guro Geumchun	683,790	145.58	13.20	3.72	32.64	4.57%
	Gwanak Dongjak	478,594	153.25	13.07	4.68	29.69	2.71%
	Yongsan	924,081	169.41	16.45	8.51	42.08	1.04%
PBBD	PTV	1,037,946	185.11	18.51	2.39	43.93	0.39%
	Bundang	922,786	167.05	14.46	6.41	42.47	2.29%



## Land Use Information by District

District	Building Name	Address	Land Use	GFA (㎡)	Completion
GBD	Youngdong SC Building	Yeoksam-dong Gangnam-gu	#1 Commercial	5,213	10-Mar
	A-Tower 2	Samsung-dong Gangnam-gu	Office	2,000	23-Mar
	A-Tower 1	Samsung-dong Gangnam-gu	Office	1,883	23-Mar
	C-Building	Daechi-dong Gangnam-gu	#2 Commercial	1,606	25-Mar
ETC	Sun Myung Square	Sungsoo-dong 1-ga Sungdong-gu	Factory	25,104	08-Mar
	MASS C&G	Magokdong Gangseogu	Educational	7,007	25-Mar
	Kois	Magokdong Gangseogu	Educational	5,232	07-Mar
	Dream & Dream	Hwagok-dong Gangseo-gu	#1 Commercial	2,652	15-Mar
	Kyung Sung Building	Myunmok-dong Joonrang-gu	#2 Commercial	1,430	04-Mar
	JB Building	Samgeon-dong Songpa-gu	Educational	1,383	14-Mar
	AMC Building	Donggyo-dong Mapo-gu	#2 Commercial	1,138	17-Mar



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